Ouellette, Nellie (pro per Conservator/mother)

Status Hearing re: Receipt of Transfer

	NELLIE OUELLETTE was appointed conservator on 1/12/1984.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 051315 Aff.Sub.Wit.	Order dated 2/23/15 transferred this case to Kern County. This status hearing was set for the receipt of	
Verified	transfer.	
Inventory	Case file sent to Kern County on 5/6/15.	
PTC Not.Cred.	3/6/13.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp Objections		
Video Receipt		
CI Report		
9202 Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 6/11/15
UCCJEA Citation		Updates: Recommendation:
FTB Notice		File 1 - Ouellette

Atty

Motsenbocker, Gary (for Maria C. Mairena – Conservator)

Status Hearing for Failure to File a Annual or Biennial Account.

	MARIA C. MAIRENA, Mother, is Conservator	NEEDS/PROBLEMS/COMMENTS:
	of the Person and Estate with bond of	
	\$56,000.00.	Need fourth account.
	The Conservator's Third Account was settled	
Cont from 011415,	on 8/23/12.	
051315	<u> </u>	
Aff.Sub.Wit.	On 10/17/14, the Court set this status hearing	
Verified	for failure to file a fourth account.	
Inventory	Notice of Status Hearing was filed to Attorney	
PTC	Motsenbocker and Maria Mairena on	
Not.Cred.	10/17/14.	
Notice of		
Hrg	Status Report filed 5/6/15 by Attorney Dean	
Aff.Mail	Hiyama states Attorney Motsenbocker passed away on 2/19/15. Attorney Hiyama is	
Aff.Pub.	in the process of purchasing Mr.	
Sp.Ntc.	Motsenbocker's business and is in the	
Pers.Serv.	process of obtaining a Substitution of	
Conf.	Attorney from Maria Mariena, as well as	
Screen	documents necessary to prepare and file the	
Letters	fourth account current, which will cover the period from 9/18/11 through 4/17/15.	
Duties/Supp	Attorney Hiyama estimates filing within the	
Objections	next 15 days and therefore requests	
Video	continuance for approx. 30 days.	
Receipt	-	
CI Report	Status Report field 6/15/15 states due to the	
9202 Order	numerous amount of expenditures each month made on behalf of the Conservatee,	
Aff. Posting	the previously estimated time to complete	Reviewed by: skc
Status Rpt	the fourth account was not realistic. The	Reviewed by: SKC
UCCJEA	anticipated fourth account current will be	Updates: 6/15/15
Citation	covering the period beginning 9/18/11	Recommendation:
FTB Notice	through 4/17/15. Attorney Hiyama requests	File 2 – Mairena
	an additional amount of time not to exceed 30 days.	
	j oo aays.	

3 Camille Dolores Smith (Estate)

Case No. 08CEPR00560

Attorney: Curtis D. Rindlisbacher (for Administrator Kenneth Wall)

Probate Status Hearing re: Filing Informal Accounting

Probate Status Heating te. Filing Informat Accounting			
	KENNETH WALL is Administrator.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from	On 12/17/14 the Court approved the First and Final Report and Petition for Final Distribution. The Petition included a closing reserve of \$35,000.00.	Need informal accounting re: closing reserve or current written status report pursuant to Local	
Aff.Sub.Wit.		Rule 7.5 which states in all matters	
Verified	Minute Order dated 12/17/14 set this status hearing for an informal	set for status hearing verified status reports must be filed no	
Inventory	accounting of the closing reserve.	later than 10 days before the	
PTC		hearing. Status Reports must	
Not.Cred.		comply with the applicable code	
Notice of		requirements. Notice of the status	
Hrg		hearing, together with a copy of	
Aff.Mail		the Status Report shall be served	
Aff.Pub.		on all necessary parties.	
Sp.Ntc.			
Pers.Serv.			
Conf.			
Screen			
Letters			
Duties/Supp			
Objections			
Video			
Receipt	_		
CI Report			
9202	<u>_</u>		
Order	_		
Aff. Posting	_	Reviewed by: KT	
Status Rpt	_	Reviewed on: 6/11/15	
UCCJEA	_	Updates:	
Citation	_	Recommendation:	
FTB Notice		File 3 - Smith	

Attorney: None

Probate Status Hearing re: Receipt of Transfer

		caming re: Receipt of	
	FRANKLIN and CHR	ISTINA MATA,	NEEDS/PROBLEMS/COMMENTS:
	parents, were appo	ointed	
	conservators in Los	Angeles County	Need Receipt of Transfer from
	on 4/17/2001.		Orange County.
Cont. from	Order dated 4/1//1	LE transformed this	Crango Coomy.
Aff.Sub.Wit.	Order dated 4/16/1		
Verified	case to Orange Cohearing was set for	•	
Inventory	transfer.	me receipi oi	
PTC			
Not.Cred.	Case file sent to Or	ange County on	
Notice of	5/14/15.		
Hrg	Boturn Mail Boosins	t chave the acce	
Aff.Mail	Return Mail Receipt		
Aff.Pub.	file was received by	y Orange County	
Sp.Ntc.	on 5/18/15.		
Pers.Serv.			
Conf.			
Screen	_		
Letters			
Duties/Supp			
Objections			
Video			
Receipt	╡		
CI Report	╡		
9202	_		
Order	_		
Aff. Posting	_		Reviewed by: KT
Status Rpt	4		Reviewed on: 6/11/15
UCCJEA	4		Updates:
Citation	4		Recommendation:
FTB Notice			File 4 – Mata

Δ

Attorney Donaldson, Larry A. (for Conservator Kenneth Roberts)

Probate Status Hearing Re: Failure to Submit the Order after Hearing for' Hearing on 12/3/13

	neding on 12/3/13			
		NEEDS/PROBLEMS/COMMENTS:		
		OFF CALENDAR		
Cont. from		Order on Final Account signed		
Aff.Sub.Wit.		6/10/2015.		
Verified				
Inventory				
PTC				
Not.Cred.				
Notice of				
Hrg				
Aff.Mail				
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf. Screen				
Letters				
Duties/Supp				
Objections				
Video				
Receipt				
CI Report				
9202				
Order				
Aff. Posting		Reviewed by: LEG		
Status Rpt		Reviewed on: 6/11/15		
UCCJEA		Updates:		
Citation		Recommendation:		
FTB Notice		File 5 - Roberts		

6A Jennifer Roberts (Special Needs Trust) Case No. 12CEPR00751

Attorney Teixeira, J. Stanley (for Christina Roberts – Mother – Petitioner)

Petition for Order to Receive Additional Property into the Jennifer Roberts Special Needs Trust

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.		Note: Court records indicate hearing is set for 7/8/15 on an amended petition for final distribution in the Estate of Michael Roberts 12CEPR00290.
Verified Inventory PTC Not.Cred. Votice of		The Court may require clarification as to the nature and amount of assets to be received into the SNT for further orders re bond or blocked account.
Hrg V Aff.Mail W Aff.Pub. Sp.Ntc. Pers.Serv.		Note: The First Account of the Trustee covering the period of 11/5/12-11/5/13 was settled on 8/11/14. The Court will set status hearings as follows:
Conf. Screen Letters Duties/Supp		Wednesday, August 26, 2015 for filing of bond or receipt for deposit of funds into blocked account
Objections Video Receipt CI Report		Wednesday, March 9, 2016, or as appropriate, for the filing of the Second Account.
9202 V Order Aff. Posting		If proper items are on file prior to the status dates per Local Rule 7.5, the status dates may come off calendar. Reviewed by: skc
Status Rpt UCCJEA Citation FTB Notice		Reviewed by: 3RC Reviewed on: 6/12/15 Updates: Recommendation: File 6A - Roberts

6**A**

Attorney

Teixeira, J. Stanley (for Christina Roberts – Mother – Petitioner)
Petition for Appointment of Guardian Ad Litem

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail W Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order		1. It appears Petitioner is requesting appointment as guardian ad litem for purposes of representing Jennifer Roberts' interests in her father's estate matter, which is Case No. 12CEPR00290. If that is the case, it appears it would be appropriate to have filed the petition for appointment in that matter. The Court may require clarification or authority for appointment in this Special Needs Trust matter to carry over to the estate matter.
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 6/12/15
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 6B - Roberts

6B

Attorney: Deborah K. Boyett (for Executor Jesusita Gonzalez).

Status Hearing Re: Filing of the Final Account and/or Petition for Final Distribution

DC	D: 8/23/12		JESUSITA GONZALEZ was appointed	NEEDS/PROBLEMS/COMMENTS:
			Executor with full IAEA and without	
			bond on 10/24/12.	
Co	nt. from		First Account and Report was	
	Aff.Sub.Wit.	l	approved on 6/18/14 at which time	
	Verified		this status hearing was set for the filing	
✓	verilled		of the petition for final distribution.	
	Inventory			
	PTC		Status Report filed on 6/5/15 states the	
	Not.Cred.		estate is not now in a condition to be	
	Notice of		closed and no property can as yet	
	Hrg		safely be distributed by reason of the	
1	Aff.Mail	W/	following: transfer of late discovered	
	Aff.Pub.		property, namely Liquor License No.	
	Sp.Ntc.		512703 remains in a pending escrow waiting for approval of transfer by the	
	Pers.Serv.		California Department of Alcohol	
	Conf.		Beverage Control (ABC). On or about	
	Screen		5/21/15, Petitioner spoke by phone	
	Letters		with an ABC representative who	
	Duties/Supp		indicated said license is to be	
	Objections		released for transfer to another	
	Video		purchaser in the very near future.	
	Receipt		Petitioner requests authorization to	
	CI Report		continue administration of the estate	
	9202		until September 30, 2015.	
	Order		-	
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 6/11/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 7 - Gonzales

Atty Kruthers, Heather (for Public Administrator)
Atty Galindo, Lupe (Pro Per – Former Executor)

Status Re: First and Final Account and Report of Executor With Will, and Petition for Final Distribution

DO	D: 1-28-13		FRESNO COUNTY PUBLIC ADMINISTRATOR	NEEDS/PROBLEMS/COMMENTS:
			was appointed personal representative	NEEDS, I ROBLEMS, COMMENTS.
			on 3/4/15.	OEE CALENDAR
				OFF CALENDAR
			History: LUPE GALINDO, Niece, was	
	nt from 010715	5,	appointed as Executor with Full IAEA	Amended Final Account filed
060	315		without bond on 10/28/13.	6/8/15 is set for hearing on 7/14/15
	Aff.Sub.Wit.			
>	Verified		I&A filed 3-7-14 consists of real property	
>	Inventory		valued at \$170,000.00.	
>	PTC		The California Department of Health	
>	Not.Cred.		Care Services originally filed a claim on	
	Notice of	Х	10/8/13 for \$148,510.68, but later	
	Hrg		amended the claim on 1/13/14 to	
	Aff.Mail	Х	\$98,508.40.	
	Aff.Pub.			
	Sp.Ntc.		On 11/20/14, Ms. Galindo filed a First and Final Account and Petition for Final	
	Pers.Serv.		Distribution in which she stated that she	
	Conf.		had submitted a hardship waiver to DHS	
	Screen		and requested distribution of the real	
	Letters		property to her, as she resides in the	
	Duties/Supp		estate real property.	
	Objections		Examiner Notes listed numerous	
	Video		deficiencies with the petition that have	
	Receipt		not been cured. At the continued	
	CI Report		hearing on 3/4/15, the Court removed	
	9202	Х	Ms. Galindo and appointed the Public	
	Order	Х	Administrator as personal representative.	
	Aff. Posting		The Court ordered Ms. Galindo to	Reviewed by: skc
	Status Rpt		provide all documents and information	Reviewed on: 6/11/15
	UCCJEA		regarding the estate to the Public Administrator by 3/25/15 and set this	Updates:
	Citation		status hearing.	Recommendation:
	FTB Notice	Х		File 8 - Samora
	·			

George Feodor Taylor (Estate) Case No. 13Cl McCloskey, Daniel T. (for Gregory L. Taylor – Administrator with Will Annexed) Anderson, Bonnie (for Diane Taylor) Atty

Atty

Diane Taylor is now self-represented

Notice of Motion for Order Striking the Memorandum of Costs in Its' Entirety or in the Alternative Taxing Costs of Court

DO	D: 2/16/09		GREGORY L. TAYLOR, Administrator, is Petitioner.	NEEDS/PROBLEMS/
				COMMENTS:
			Petitioner moves the court for an order striking the	1
			entire Memorandum of Costs as untimely, or, in	Note: Pursuant to
			the alternative taxing the costs of this action	Substitution of Attorney
	A (C) \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \		under Cal. Rules of Court 870 and CCP § 1033.5	filed 6/15/15, Diane Taylor
	Aff.Sub.Wit.		with specific reference to the following:	is now self-represented.
~	Verified		1 Harry 1/la) \$105.00 was productive ways and Objectories	
	Inventory		1. Item 1(b) \$105.00 re a status report. Objector is not required to file a status report and it is	
	PTC		unnecessary, not reasonable, excessive, and	
	Not.Cred.		no results were achieved.	
~	Notice of		2. Items 1(c)(e)(f) \$1,305.00 re filing fees to object	
	Hrg		to the First and Final Account as such	
~	Aff.Mail	W	pleadings were not necessary nor reasonable	
	Aff.Pub.		to secure Objector's inheritance. This cost was	
	Sp.Ntc.		incurred after the 2006 Codicil was admitted	
-	Pers.Serv.		to probate. Objector is seeking fees for not	
 			only work that was unreasonable,	
	Conf.		unnecessary, and in excessive amounts and	
l	Screen		where Objector lost on each objection.	
—	Letters		3. Items 5(a)-(c) \$307.71 service of process	
	Duties/Supp		4. Item 8(a) \$75.00 cost not properly chargeable.5. Item 10 \$23,011.50. Attorney fees are not	
	Objections		proper for inclusion in this memorandum of	
	Video		costs pursuant to CCP and can only be	
	Receipt		awarded through a noticed motion process or	
	CI Report		through the probate petition process. This	
	9202		matter was correctly referred back to the	
	Order	Χ	Probate Judge without hearing, and the cost	
	Aff. Posting		of this item is not properly chargable in this	Reviewed by: skc
	Status Rpt		action nor is it a cost allowable by	Reviewed on: 6/11/15
	UCCJEA		memorandum under CCP 1033.5.	Updates: 6/16/15
	Citation		6. Item 11 \$606.17 for trial exhibits & blowup of charts. There was no trial so this is not a cost	Recommendation:
	FTB Notice		allowable under CCP.	File 9 - Taylor
			7. Item 12 \$1,035.00 for court reporter fees	ĺ
			7. 110111 12 \$1,000.00 101 00011 1000	
			Points and authorities provided.	
			·	
			See also Declaration of Daniel T. McCloskey in	
			Support of Motion for Order Taxing Costs filed	
		<u> </u>	5/8/15.	

10 Billie J. Diener (Estate)

Case No. 13CEPR00556

Attorney: Philip M. Flanigan (for former Executor Eric P. Diener)
Attorney: Heather Kruthers (for Administrator, Public Administrator)

First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and Distribution.

DC	DD: 12/14/09	PUBLIC ADMINISTRATOR, Successor	NEEDS/PROBLEMS/COMMENTS:
		Administrator, is petitioner.	
		· ·	
		Account period: 1/12/15 – 5/4/15	
Со	ont. from	Accounting - \$730,570.22	
	Aff.Sub.Wit.	Beginning POH - \$606,521.72	
1	Verified	Ending POH - \$620,147.80	
1	Inventory	Administrator - \$17,611.41	
-		(statutory. PA asserts that the former	
✓	PTC	Administrator should not be entitled to	
✓	Not.Cred.	any fees given his lack of finalizing	
1	Notice of	administration of this estate, thus	
	Hrg	requiring the PA's appointment and closing of the estate.)	
1	Aff.Mail W/	5.55	
	Aff.Pub.	Attorney - \$17,611.41	
	Sp.Ntc.	(statutory. Apportioned \$11,726.48 to	
	Pers.Serv.	Philip Flanigan and \$5,884.93 to Countly Counsel.)	
	Conf.	Coorning Coornson.,	
	Screen	X/O (PA) - \$1,455.10	
✓	Letters 8/22/13	(for sale of real and personal property	
	Duties/Supp	and preparation of taxes.)	
	Objections	Costs (PA) - \$25.50	
	Video	(certified copies)	
	Receipt	Costs (Flaniagn) C1 540 40	
	CI Report	Costs (Flanigan) - \$1,549.49 (filing fee, probate referee, publication,	
✓	9202	certified copies)	
1	Order]	
	Aff. Posting	Bond fee - \$608.84	Reviewed by: KT
	Status Rpt	Distribution pursuant to Decedent's Will	Reviewed on: 6/11/15
	UCCJEA	is to:	Updates:
	Citation		Recommendation:
√	FTB Notice	Eric P. Diener - \$490,851.05 and	File 10 - Diener
		real property.	

Atty Paganetti, Steven E. (for Henry Barigian – Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

DO	D: 01/27/1998	HENRY BARIGIAN, was appointed Executor with full	NEEDS/PROBLEMS/COMMENTS:
		IAEA without bond on 10/15/2014.	1 None disconstant and
-		Letters issued on 10/16/2014.	Need Inventory and Appraisal.
Со	nt. from 030415	Minute Order of 10/15/2014 set this status hearing for	
	Aff.Sub.Wit.	the filing of the Inventory and Appraisal.	
		Status Conference Statement filed (/8 /2015 states:	
	Inventory	Status Conference Statement filed 6/8/2015 states: Executor Henry Barigian was appointed by the Court	
	PTC	on 10/15/2014. The assets of the Estate of Warren	
	Not.Cred.	Barigian include a 50 percent interest in real property	
	Notice of	generally known as 110 South 6 th St. Fowler, Ca. The	
	Hrg	Fowler property is subject to a judgment of foreclosure	
✓	Aff.Mail	and order of sale in favor of creditor Ray Bergman. The judicial foreclosure sale has not taken place, and there	
	Aff.Pub.	has been no judgment entered regarding any	
	Sp.Ntc.	deficiency. Judgment will be entered based upon a	
	Pers.Serv.	noticed motion after the property is sold. The only	
	Conf.	other asset of Warren Barigian is an unsatisfied	
	Screen	judgment against Craig Burchfiel and All Encompass	
	Letters	Financial in the principal amount of \$132,210.75. It is unknown at this time whether there are any assets to	
	Duties/Supp	satisfy any portion of this judgment.	
	Objections		
	Video	The Probate Refere in this case is Rick Smith. On June 5,	
	Receipt	2015, an Inventory and Appraisal was sent of Mr. Smith	
	CI Report	for his determination regarding whether there is any value to these assets.	
	9202	value 10 mese assers.	
	Order	It is requested that this status hearing be continued for	
	Aff. Posting	a period of 60 days in order to obtain determination of	Reviewed by: LV / LEG
✓	Status Rpt	value from Probate Referee Rick Smith.	Reviewed on: 6/12/2015 (LEG)
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 11 - Barigian

11

12

Midge Miyoko Matsumura (CONS/PE)

Case No. 14CEPR00608

Attorney Attorney Lind, Ruth P. (Court Appointed for Conservatee)

Edwards, Mark D. (Petitioner – attorney for Johannes F. Shoemaker and Catharina M. Vandepavert – Conservators)

Petition - Attorney Fees

Age: 78 Cont. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Х Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp **Objections** Video Receipt CI Report 9202 Order Aff. Posting Status Rpt **UCCJEA** Citation **FTB Notice**

MARK D. EDWARDS, Petitioner, represented the co-conservators in their petition for appointment as Conservator.

JOHANNES F. SCHOEMAKER and CATHARINA M. VANDPAVERT, non-relatives (long-time friends), were appointed Co-Conservators of the Person and Estate on 08/19/14 with bond fixed at \$2,000,000.00. Bond filed 09/03/14 and Letters issued on 09/03/14.

Petitioner requests fees in connection with his representation of the Co-Conservators in the Petition for Appointment of Conservator.

Petitioner asks that he be paid from the conservatorship estate for 34.9 hours @ \$250/hr. plus a filing fee of \$435.00 for a total of \$9,160.00.

Services are itemized by date and include preparation of documents, visits with client, and court appearances.

NEEDS/PROBLEMS/COMMENTS:

 Need Notice of Hearing and proof of service by mail of Notice of Hearing at least 15 days before the hearing on the conservatee and all other interested parties. Note: Proof of service filed 06/15/15 states that a copy of the Petition was served on the Conservators on 05/20/15; however, Notice of Hearing (GC-020) is a Mandatory Form and should be used for Notice in Probate Matters.

Note: CA Rules of Court Rule 7.752 states: Notwithstanding the time period after which a petition may be filed for an allowance of compensation to a guardian, conservator, or an attorney for a guardian or conservator, the court may order the guardian or conservator to file an accounting before or at the time a petition for an allowance of compensation is filed or heard.

Note: A Status Hearing is currently set for 10/20/15 for filing of the First Account.

Reviewed by: JF
Reviewed on: 06/11/15
Updates: 06/16/15
Recommendation:
File 12 - Matsumura

12

Attorney Guardian

Kruthers, Heather (for Public Guardian)

Twioneshia Nacole Miles (Pro Per – Mother – Former Guardian of the Estate)

Status Re Funds

Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters **Duties/Supp Objections** Video Receipt **CI Report** 9202 Order Aff. Posting Status Rpt **UCCJEA** Citation FTB Notice

TWIONESHIA NACOLE MILES, mother, was appointed as Guardian of the Estate on 2/25/15. The Court ordered that all funds (\$20,000.00) be placed into a blocked account.

At a status hearing for Receipt for Blocked Account on 4/15/15, there were no appearances. The Court issued an Order to Show Cause to Twioneshia Miles as to why she should not be removed as Guardian for failure to file the receipt for blocked account, and order Ms. Miles to be personally present on 6/3/15.

Minute Order 6/3/15 states: Ms. Miles represents that she received funds in the amount of \$17,035.76, cashed the check, and kept \$3,000.00. She then paid \$1,474.00 for her PG&E bill, keeping the remainder in a safe, and leaving \$12,000.00 in an unblocked bank account at Bank of America on Shaw and Angus. The Court orders that Ms. Miles is removed as Guardian and appoints the Public Guardian forthwith. Ms. Miles is directed to wait in the court room until the Public Guardian appears today. At the arrival of Clint Yarbrough, Deputy Public Guardian, the Court orders all of the remaining funds seized from the bank and from the home of Ms. Miles. Any requests by Ms. Miles for withdrawal of funds will have to be made through the Public Guardian.

NEEDS/PROBLEMS/COMMENTS:

Note: This petition was filed with a fee waiver. Pursuant to Government Code §68631, on 2/25/15, the Court authorized the payment of the \$435 filing fee from the blocked account upon funding of the estate. It does not appear that fee has been paid.

Reviewed by: skc **Reviewed on:** 6/11/15 **Updates:**

File 15 - Dupree

Recommendation:

14 Burl Donald Kitchen (Estate)

Case No. 15CEPR00319

Attorney Bagdasarian, Gary G. (for Beverly E. Kitchen – spouse/Petitioner)

Petition for Probate of Letters of Administration; Authorization to Administer Under

IAEA (Prob. C. 8002, 10450)

DC	D: 10/31/14		BEVERLY E. KITCHEN, surviving spouse, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner, and requests appointment	
			as Administrator without bond.	 Petitioner requests
				appointment without bond
			Full IAEA – OK	stating that there are no
Co	nt. from 05111	5		assets in the estate at this
	Aff.Sub.Wit.		Decedent died intestate	time. All beneficiaries/heirs
<u> </u>	Verified		Residence: Fresno	have not waived bond. The Court may require more
	Inventory		Publication: The Business Journal	information.
	PTC		T Oblication. The Bosiness Southair	ii iioiiiiaiioii.
	Not.Cred.		Estimated Value of the Estate:	
✓	Notice of		\$0.00 - Petitioner states that the only	
	Hrg		assets of the estate are rights of	
✓	Aff.Mail	w/	competing heirs as beneficiaries of a	
✓	Aff.Pub.		life insurance policy and individual	
	Sp.Ntc.		retirement account. There are no other assets in the estate at this time.	
	Pers.Serv.		Cirioi assers in the estate at this little.	
	Conf.		Probate Referee: RICK SMITH	
	Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 05/07/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 14 - Kitchen
				7.4

14

Bagdasarian, Gary G. (for Mayra A. Andrade – Mother – Petitioner)

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

	See petition for details. NEEDS/PROBLEMS/COMMENTS:		
			Court Investigator advised rights on 4/22/15
Cont from 05121:	5		Voting rights affected – need minute
Aff.Sub.Wit.			order
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of			
Hrg			
✓ Aff.Mail	W		
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	W		
✓ Conf.			
Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
✓ Video			
Receipt			
✓ CI Report			
9202 ✓ Order			
Oldel			Davidayya di kaya da
Aff. Posting			Reviewed by: skc
Status Rpt			Reviewed on: 6/11/15
UCCJEA Citation			Updates:
Citation			Recommendation:
FTB Notice			File 15 - Andrade

16 Lillie Stubblefield (CONS/PE)

Case No. 15CEPR00344

Petitioner Steven D. Stubblefield (Pro Per – Son – Petitioner)
Objector Tasha Stubblefield (Pro Per – Grandson – Objector)

Attorney Teixeira, J. Stanley (Court appointed for Proposed Conservatee)

Petition - Appoint Probate Conservator

See petition for details. NEEDS/PROBLEMS/COMMENTS:			
		Court Investigator to advise rights, complete investigation.	
		Voting rights affected – need minute order.	
Cont from 051315		1. Petitioner filed the GC-335 Attachment	
Aff.Sub.Wit.		Requesting Special Orders Regarding	
✓ Verified		Dementia separately on 6/2/15 and served a copy on relatives; however,	
Inventory		need proof of service on Proposed	
PTC		Conservatee Lillie Stubblefield.	
Not.Cred.		Note: An attorney has been appointed	
✓ Notice of		to represent the proposed Conservatee pursuant to Probate Code §§	
Hrg Aff Mail		2356.5(f)(1), 1470, due to this request.	
All.Mail W		2. Petitioner requests appointment without	
Aff.Pub.		bond; however, pursuant to Cal. Rule of	
Sp.Ntc.		Court 7.207 and Probate Code §2320(c)(4), bond including cost of	
Y Pers.Serv. W Conf.		recovery is required for every	
Screen		conservator of the estate. Examiner	
✓ Letters		calculates bond including cost of recovery at \$21,485.20.	
✓ Duties/Supp		•	
✓ Objections		Note: There is no provision for waiving the filing of an inventory and appraisal. Further,	
✓ Video		at least a first account is required prior to	
Receipt		waiving further accounts pursuant to	
CI Report X		Probate Code §2628. Therefore, if granted, the Court will set status hearings as follows:	
9202		Wednesday, Aug. 5, 2015 for filing bond	
✓ Order		Wednesday, Nov. 18, 2015 for filing the Inventory and Appraisal	
		Wednesday, Sept. 14, 2016 for filing the first account.	
		If the proper items are on file pursuant to Local Rule 7.5, the status hearings may be taken off calendar.	
Aff. Posting		Reviewed by: skc	
Status Rpt		Reviewed on: 6/11/15	
UCCJEA		Updates:	
Citation		Recommendation:	
FTB Notice		File 16 - Stubblefield	

Michael Ibarra (GUARD/P) Case No. 15CEPR00378 Gomez, Christina Rose (pro per – sister) Petition - Appoint Guardian

Petitioner

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Ag	Age: 4 mos.		TEMPORARY EXPIRES 06/17/15	NEEDS/PROBLEMS/COMMENTS:	
			CHRISTINA ROSE GOMEZ, sister, is Petitioner.	 Need Notice of Hearing. Need proof of service by mail at 	
Co ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	nt. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	x x x x x x x x x x x x x x x x x x x	Father: JOSE IBARRA – deceased Mother: DOLORES MACIAS-IBARRA – Consent & Waiver of Notice filed 04/09/15; Personally served on 06/14/15 Paternal grandfather: FELIPE IBARRA Paternal grandmother: SOCORRO IBARRA – deceased Maternal grandfather: NOT LISTED Maternal grandmother: DELLA MACIAS Siblings: ANGELINE MARTINEZ – Consent & Waiver of Notice filed 04/09/15, ALISA MACIAS, ANGELA ANGUIANO, MIRACLE IBARRA, JOSE IBARRA, JR. Petitioner states [see petition for details]. Court Investigator Samantha Henson filed a report on 06/10/15.	2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Felipe Ibarra (paternal grandfather) b. Maternal grandfather c. Della Macias (maternal grandmother) d. Alisa Macias (sister) (if age 12 or over) e. Angela Anguiano (sister) (if age 12 or over) f. Miracle Ibarra (sister) (if age 12 or over) g. Jose Ibarra, Jr. (brother) (if age 12 or over)	
-	Aff. Posting Status Rpt			Reviewed by: JF Reviewed on: 06/12/15	
✓	UCCJEA			Updates: 06/16/15	
	Citation			Recommendation:	
	FTB Notice			File 17 - Ibarra	

17

Attorney: Palmer, Charles M., for Petitioner Luz Esperanza Yepes

	Petition to Determine Succession to Real Property			
DC	D: 2/8/2015		LUZ ESPERANZA YEPES, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			40 days since DOD.	Attachment 12(a) containing a copy of Decedent's Will shows that the Will was not witnessed as required by Probate
Со	nt. from		No other proceedings.	Code § 6110(c). Given that there are no
	Aff.Sub.Wit.		3	subscribing witnesses to the Will, Petitioner as proponent of the Will in
\	Verified			support of the instant Petition to
	Inventory		& A	Determine Succession must establish by
✓	-			clear and convincing evidence that, at the time the testator signed the Will, the
	PTC		Unwitnessed Will dated 12/20/2014	testator intended the Will to constitute
	Not.Cred.		devises the entire estate to the	her Will, pursuant to Probate Code §
✓	Notice of		Petitioner.	6110(c)(2) allowing treatment of a will or
	Hrg			codicil not executed in compliance with Probate Code § 6110(c)(1) as if it was
✓	Aff.Mail	W/	D 100	executed in compliance with the
	Aff.Pub.		Petitioner requests Court determination that Decedent's	Probate Code requirements.
	Sp.Ntc.		100% interest in real property	Update: Declaration filed 6/15/15 states
	Pers.Serv.		located at 935 Waterman Ave.,	the original will does include a duly-
	Conf.		Fresno, passes to the Petitioner	executed signature page, however, it
	Screen		pursuant to Decedent's Will.	was mistakenly left off the copy
	Letters			submitted in the petition. The will was properly witnessed as per Probate Code
	Duties/Supp			§6110(c). The original will was submitted
	Objections			to the Court on 6/15/15.
	Video			Examiner's Note: The original will has now
	Receipt			been submitted to the Court's Deposited
	CI Report			Wills file. It will not be placed in this file, as
	9202			it is not being admitted to probate.
✓	Order			A copy of the will containing the witness' signatures was not submitted with the above declaration. Therefore, need complete copy of the will for this summary proceeding file.
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 6/12/15
	UCCJEA			Updates: 6/16/15 (skc)
	Citation			Recommendation:
	FTB Notice			File 18 - Linares

Attorney Arthur, Susan K., of Sanger, for Petitioner Kevin L. Barnes

Petition for Probate of Will and for Letters Testamentary

DOD: 11/7/2014	KEVIN L. BARNES , son and named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Full IAEA: OK	Note: The Court will set Status
Aff.Sub.Wit.		Hearings as follows:
✓ Verified	Will Dated: 8/23/2011	Tuesday, November 17, 2015
Inventory		at 9:00 a.m. in Dept. 303 for the filing of final inventory
PTC	Residence: Sanger	and appraisal; and
Not.Cred.	j I	Wednesday, August 17, 2016
✓ Notice of	Publication: Sanger Herald	at 9:00 a.m. in Dept. 303 for the filing of first account
Hrg		and/or petition for final
✓ Aff.Mail W/		distribution.
√ Aff.Pub.	Estimated value of the Estate: Real property - \$80,000.00	Duran versal la carl Dula 7.5 if the c
Sp.Ntc.	Personal property - \$200.00	Pursuant Local Rule 7.5, if the documents noted above are
Pers.Serv.	Total - \$80,200.00	filed 10 days prior to the dates
Conf.		listed, the hearings will be taken
Screen		off calendar and no appearance will be required.
✓ Letters	Probate Referee: Rick Smith	appearance will be required.
✓ Duties/Supp		
Objections		
Video		
Receipt		
CI Report 9202		
√ Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		Reviewed by: ££0
UCCJEA		Updates: 6/16/15 (skc)
Citation		Recommendation: SUBMITTED
FTB Notice		File 19 - Barnes

aCase No. 15CEPR00482

Attorney Knudson, David N. (for Daniel Trzebiatowski -

Petition for Probate of Will and for Letters Testamentary (Lost Will) with IAEA

D			DANIEL TOTEDIATOWSKI friend and named	
סם	D: 12/10/14		DANIEL TRZEBIATOWSKI , friend and named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Executor williour borid, is refilioner.	1. The signatures of the two
			Full IAEA – ok	witnesses to the will are not
				dated. Need Proof of
			Will dated 7/25/08	Subscribing Witness. Probate Code §§ 6110(c)
	Aff.Sub.Wit.	Χ		and 8220.
>	Verified		Residence: Reedley, CA	
	Inventory		Publication: Reedley Exponent	
	PTC		Estimated Value of Estate:	Note: If granted, the Court will set status hearings as follows:
	Not.Cred.		Estimated Value of Estate: Personal property: \$515,000.00	_
~	Notice of		Annual income: \$ 1,000.00	Wednesday, Nov. 18, 2015 for filling the Inventory and
	Hrg		Total: \$516,000.00	for filing the Inventory and Appraisal
~	Aff.Mail	W	· · ·	 Wednesday, Sept. 14, 2016
~	Aff.Pub.		Probate Referee: Steven Diebert	for filng the first account or
	Sp.Ntc.		Petitioner states he has been unable to locate	petition for final distribution
	Pers.Serv.		the original will. The decedent had a domestic	If the proper items are on file
	Conf.		partner who lived with him from time to time;	pursuant to Local Rule 7.5, the
	Screen		following his death, a number of pieces of	status dates may come off calendar.
~	Letters		furniture and personal items were removed from	calendar.
~	Duties/Supp		the house, despite Petitioner's request that	
	Objections		nothing be removed. Petitioner believes the will	
	Video		was not destroyed, but that it was inadvertently	
	Receipt		misplaced or lost in the confusion following his death.	
	CI Report		dediii.	
	9202		Petitioner states the will was executed as part of	
>	Order		an integrated estate plan including a living trust	
	Aff. Posting		and pour-over will prepared by a law firm in	Reviewed by: skc
	Status Rpt		Southern California. Petitioner has located the	Reviewed on: 6/12/15
	UCCJEA		original trust, and several copies of the will, but has been unable to locate the original will. A	Updates: 6/15/15
	Citation		signed copy of an amendment to the trust	Recommendation:
	FTB Notice		prepared in February 2014 has also not been	File 20 - Capet
			found. Petitioner states in late 2013 or early 2014,	
			he had several discussions with the decedent	
			concerning his will and trust. He said everything	
			should be sold and the proceeds divided into six	
			equal shares. This is consistent with the 2014	
			amendment, which changed the distribution of the trust. Petitioner at all times was aware that	
			he would be acting as executor and trustee on	
			behalf of his friend.	
	l	L	<u> </u>	<u></u>

Attorney

Dornay, Val J. (for Petitioners)

Petition to Determine Succession to Real Property

DO	D: 12/1/13		Petitioners are: RAMONA MEJIA (Daughter) MARIA SANDOVAL (Daughter) ROSEMARY GARCIA (Daughter) SOCORRO VILLAREAL (Daughter)	NEEDS/PROBLEMS/COMMENTS:
✓✓✓	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of		 GUADALUPE BORJAS (Daughter) CONNIE MEJIA SANDERS (Daughter) RUTH MEJIA (Daughter) JESSICA OCHOA (Daughter) SALVADOR MEJIA (Son) ANGELINA GARCIA (Daughter) CHRISTINA GONZALES (Niece) 	
~	Aff.Mail Aff.Pub.	W/O	40 days since DOD	
	Sp.Ntc. Pers.Serv. Conf.		No other proceedings Will dated 8/12/09	
	Screen Letters Duties/Supp		I&A: \$120,000.00 (Real property) Petitioners request Court	
	Objections Video Receipt		determination that the decedent's 100% interest in the real property passes to them in 1/11 interests each	
	CI Report 9202		pursuant to the decedent's will. In addition, Salvador Mejia will have the right to live in the residence as	
-	Order Aff. Posting Status Rpt		long as he wishes to do so.	Reviewed by: skc Reviewed on: 6/12/15
	UCCJEA Citation FTB Notice			Updates: Recommendation: SUBMITTED File 21 - Mejia

22 Gregg D. Rendino aka Gregg Dwayne Rendino (Estate) Case No. 15CEPR00485

Attorney Erlach, Mara M. (for Christina F. Rendino – surviving spouse/Petitioner)

Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act

	Independent Administration of Estates Act			
DC	D: 09/23/14	CHRISTINA F. RENDINO, surviving	NEEDS/PROBLEMS/COMMENTS:	
		spouse, is Petitioner, and requests appointment as Administrator without bond.	According to item 6 of the petition, decedent was survived by a parent and decedent's	
✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail w/o Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	Full IAEA – OK Decedent died intestate Residence: Fresno Publication: The Business Journal Estimated Value of the Estate: Personal property - \$40,000.00 Annual income - 500.00 Real property - 200,000.00 Total - \$240,500.00 Probate Referee: RICK SMITH	mother is listed in item 8, however, decedent's father is not listed, therefore if he is deceased, need his date of death pursuant to Local Rule 7.1.1D - If a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition. 2. Petitioner requests appointment without bond and a waiver of bond was filed on behalf of decedent's mother, Mercedes Rendino; Petitioner signed the waiver of bond on behalf of decedent's mother as her attorney-in-fact. The Court may require more information and/or authority for waiving bond by power of attorney.	
	Aff. Posting	1	Reviewed by: JF	
	Status Rpt	1	Reviewed on: 06/12/15	
	UCCJEA		Updates:	
	Citation		Recommendation:	
	FTB Notice		File 22 - Rendino	

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23 Loren Hanke (Det. Succ)

Case No. 15CEPR00489

Attorney

Denning, Stephen M. (for Marlene Beyer – Petitioner)
Petition to Determine Succession to Real Property

DO	D: 4/10/13		MARLENE BEYER, Sister and Trustee of the Loren D. Hanke Trust dated 9/29/08, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			40 days since DOD	
	Aff.Sub.Wit.	S/P	No other proceedings	
>	Verified Inventory		I&A: \$18,000.00 (a 1/5 interest in real	
	PTC		property located at 3891 N. Lafayette in Fresno)	
>	Not.Cred. Notice of Hrg		Will dated 9/29/08 devises personal property to Petitioner and the residue	
>	Aff.Mail	W	to the Loren D. Hanke Trust dated 9/29/08.	
	Aff.Pub.		7727700.	
	Sp.Ntc. Pers.Serv.		Petitioner requests court determination	
	Conf.		that the decedent's interest in the real property passes to her as trustee	
	Screen		pursuant to decedent's will.	
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt CI Report			
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 6/12/15
	UCCJEA			Updates: 6/16/15
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 23 - Hanke

Attorney Attorney Knudson, David (Court Appointed for Conservatee) Kruthers, Heather H. (for Public Guardian – Petitioner)

Petition for Appointment of Probate Conservator of the Person and Estate

-	retition for Appointment of Probate Conservator of the Person and Estate				
Age: 80 years	TEMPORARY EXPIRES: 06/17/15	NEEDS/PROBLEMS/ COMMENTS:			
Cont. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail W/ Aff.Pub. Sp.Ntc. Pers.Serv. W/ Conf. Nodesen Letters Duties/Supp n/a Objections Video Receipt CI Report 9202 Vorder	PUBLIC GUARDIAN, is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers to administer dementia medications and for placement in a secured perimeter facility and for appointment as conservator of the estate without bond. Estimated value of the estate: Annual income - \$20,400.00 Real property - \$80,000.00 Petitioner states [see Petition for details]. Court Investigator Julie Negrete's filed a report on 06/09/15.	Court Investigator advised rights on 06/04/15. Note: the Court will set status hearings as follows: Wednesday, Nov. 18, 2015 for filing the Inventory and Appraisal Wednesday, Sept. 14, 2016 for filing the first account. If the proper items are on file pursuant to Local Rule 7.5, the status hearings may be taken off calendar.			
Aff. Posting		Reviewed by: JF			
Status Rpt	-	Reviewed by: 31 Reviewed on: 06/12/15			
UCCJEA	-	Updates:			
✓ Citation	1	Recommendation:			
FTB Notice	1	File 24 - Owen			